ALTIGEN COMMUNICATIONS
410 East Plumeria Drive • San Jose, CA 95134
www.altigen.com • +1 (408) 597-9000

MAX Communication Server Release 7.0

Upgrade Guidelines

Intended audience:
AltiGen Authorized Partners

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Introduction

This guide introduces the updated features in MAXCS 7.0 and provides guidelines for upgrading from earlier releases of MAXCS to Release 7.0.

For directions on migrating to MAXCS 7.0 Private Cloud, refer to the *Partners Methods and Procedures for MAXCS Private Cloud* guide, which is available from your AltiGen Communications sales representative.

Enhancements Included in Release 7.0

The MAXCS 7.0 release includes enhancements in the following areas:

SightMax Integration – SightMax is a 3rd party Live Chat (Instant Messaging) platform provided by SmartMax Software. In MAXCS release 7.0, AltiGen has added the ability to integrate with the SightMax Enterprise Edition software. This allows companies to receive both telephone (voice) calls and IM chats.

Note: SightMax is not AltiGen software, and it must be purchased separately. An account with SightMax (www.sightmax.com) is required in order to use the SightMax integration with MaxCS 7.0.

Report Enhancements – In response to customer requests, the following reports have been updated:

- 1101 – Agent Activity Event Report. This report now displays the description of the Logout Reason code. In addition, the report also shows the total minutes (duration) that the agent has spent in each Logout Reason code. In addition, there is a new checkbox, *Shift Time*, in the filter section of the report definition
- 2202 – Agent Performance Summary Report. This report now shows the total amount of time spent per Logout Reason code, and has a new field called *Total Logout Duration*.
- 2206 – Inbound Calls Wait Time Summary. This report now includes two new fields: Total Ring Time (RT) and Average Ring Time (Avg RT).
- 3201 – Call Summary Report. This report now includes a *Filter by MAXCS DNIS Name* option. You can use this checkbox to narrow the list in the left pane.

IP 805 Phone – MAXCS Release 7 includes a new IP phone: the IP 805. The IP 805 phone works with MAXCS Release 7.0 and later.

GUI Enhancements – The following pages in MaxAdministrator have been improved for greater legibility.

- **OutCall Routing –** In the Out Call Routing section, the Route Definition tab has been updated. The *Member Trunks* list and the *Not Member* lists have been expanded, to make the trunk details easier to see.
- **Auto Attendant –** The Auto Attendant configuration page has been updated. The Menu tree panel has been widened, so that you can more easily see the lower branches of the tree.
- **The Services Menu** – On the Services menu, a choice on the **Utilities** menu has been renamed. The first item has been changed from **System Data Management** to **Backup and Restore**.
- **Extension Configuration** – On the Extension Configuration page, the Answering tab has been updated. The GUI for the forwarding options has been changed so that the pulldown menu items are larger, and therefore are easier to read.

- **In Call Routing** – On the In Call Routing Configuration page, the GUI has been updated. The pull-down menus have been widened, so that the choices are easier to read.
- **Trace Collector** – On the Trace Collector page, the title "Time Range" has been renamed to "Time of Incident."
- **Seat License Management** – The Client Seat License Management page has been updated. The licenses in the License Types list are now listed in alphabetical order, making it easier for you to find a given license.
- **MaxCall Configuration** – The MaxCall Configuration pane has been updated. It now includes a Close button near the bottom of the panel.
- **Diagnostic Menu** – The choices on the Diagnostic menu have been changed. The *Shut Down Switching* and the *Local IP Dialing Table* choices have been removed, since they are no longer needed. In addition, a new choice has been added to the Diagnostic menu: *AltiGen Network Log*. This shortcut is a quick way to open the AltiGen Network Log Viewer.

Other Enhancements—MAXCS Release 7.0 includes some additional updates.

- **Call Handling** – Release 7.0 includes a new Workgroup option for *Group RNA/Logout Handling*. The new option, *Group Queue*, forwards incoming workgroup calls to the workgroup queue if all agents are logged out or if a call to an agent is not answered.

  With this setting, when agents log back in they can begin accepting queued calls.
- **Voicemail/Recording Throttle** – To help avoid the risk of running out of disk space, MAXCS now will check the available disk space before allowing users to leave voicemail or record calls.

  If the available space on the hard disk is less than 10% of the total space, the system will warn the user that the disk is almost full, and the voicemail or recording will not be recorded.

  Users can adjust the default threshold, 90%, by updating a registry entry.
- **Hyper-V** – Hyper-V is supported in this release.
- **Polycom IP phone behind NAT** – For supported Polycom IP phones, MAXCS now supports those conference phones behind NAT. Refer to the MAXCS 7.0 *Polycom IP Phone Configuration Guide*.
- **MaxCommunicator support for Outlook 2013** – The client application MaxCommunicator now supports Outlook 2013.
- **MaxAgent support for Outlook 2013** – The client application MaxAgent now supports Outlook 2013.
- **Exchange 2013** – Release 7.0 supports Exchange 2013 integration.
- **SIP Options** – Release 7.0 includes the ability to configure SIP Trunks to send SIP OPTIONS messages to a SIP Trunk provider as a "keep alive' signal, to verify that SIP trunks are available.
- **Disk-space checking** – A new built-in throttle checks the amount of available disk space before allowing users to record a call. If the available space on the hard disk is less than 10% of the total space, the system will warn the caller that there is not enough room to record the call, and the call will not be recorded.
- **License file** – Release 7.0 comes with a different license file.

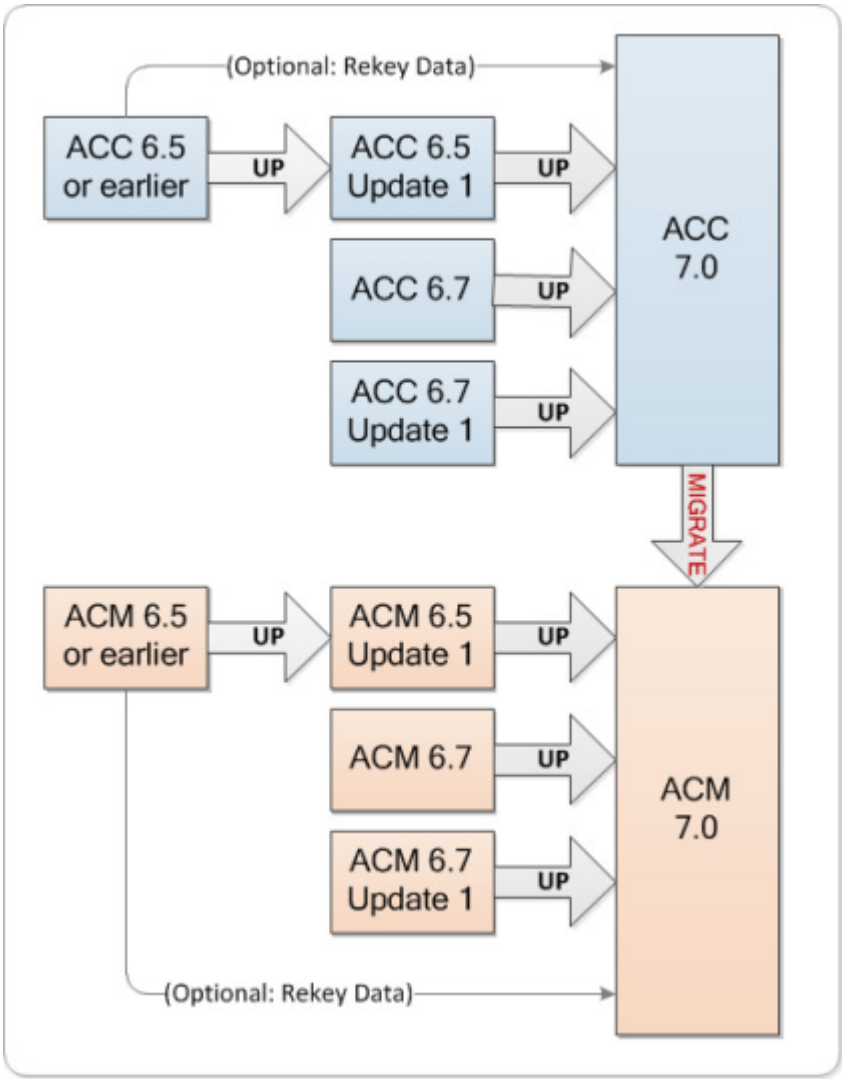
Software Upgrade Path

The following diagram shows the software upgrade path (not license registration) to convert older MAXCS databases to the 7.0 version.

It is critical to follow the upgrade instructions to avoid losing configuration data.

Note: If you are upgrading from release 6.5 or earlier, you have two options:

- You can rekey the data in Release 7.0, or
- You can upgrade to release 6.5 Update 1, and then upgrade from 6.5 Update 1 to Release 7.0.



Upgrade Package

The following upgrade media pack can be ordered through distribution:

ALTI-70UP-DVD (ACC/ACM 7.0 Upgrade Media Pack)

Note: This media pack does not include Server Upgrade licenses. You need to register the system via the registration server to obtain the license activation (EXCTL) file for the upgrade. Installation files are also available for direct download via the partner website at https://partner.altigen.com/.

Upgrade Process: MAXCS 7.0 Enterprise

For detailed upgrade steps, refer to the MAXCS 7.0 *Readme* file on the Upgrade CD.

Considerations:

- If you are upgrading an NFR system, you must obtain the new license file (EXCTL.DAT) **before** you begin the upgrade process. Otherwise, your licenses will become invalid after you perform the upgrade.
- If Exchange integration was used in the previous version of MaxCS server, you must uninstall the Outlook client before you install MaxCS Release 7.0.

1. Run the Backup & Restore tool to back up the existing configuration, voice mail messages, and greetings.
2. Perform the 7.0 product registration process and obtain the 7.0 license file.
3. Insert the MAXCS ACC or ACM 7.0 Upgrade CD and run the *setup* file.
4. Follow the instructions onscreen to complete the upgrade processes.

Upgrade Process: MAXCS 7.0 Private Cloud

For instructions on migrating a MAXCS 6.5 - 6.7.1 installation on an on-premise hardware chassis to MAXCS Private Cloud, follow the steps in the *Partners Methods and Procedures for MAXCS Private Cloud* guide, which is available from your AltiGen Communications sales representative.

Limitations for MAXCS Private Cloud:

- Analog extensions are not supported in MAXCS Private Cloud. Customers will need to replace analog phones with IP phones or use a supported gateway.
- CDR database and voice recording files are not migrated.
- Multi-Site VoIP domain is not supported in MaxCS 7.0 Private Cloud.

For any upgrade issues or questions, please contact AltiGen Technical Support:

410 E. Plumeria Drive
San Jose, CA 95134, USA
TEL: (888) ALTIGEN or (408) 597-9000
FAX: (408) 597-9020
Partner web site: https://partner.altigen.com